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ROUTING AND RECORD SHEET

SUBJECT: (Optional)

FROM: OP/Plans Staff
626 C of C

EXTENSION | NO.

DATE: 31 January 1975

TO: (Officer designation, room number, and building)	DATE RECEIVED	DATE FORWARDED	OFFICER'S INITIALS	COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)
1. DD/Pers/P&C		1/31	JFM	
2. OP/CMO				
3. DD/Pers				
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Per our telecon yesterday, The following changes were made:

1. Para E-1: the wording in last sentence now reads appropriate authorities rather than panels.

2. Para F-6: the wording changed so that the Committee recommends to the Head of the Sub-Group but also informs the A/DDA of decisions which were not recommended.

No changes were made on the other two points:

1. We believe the Directorate requirement for panel review should remain GS-06 and above. If Sub-Groups want to extend it to lower levels they still have the option.

2. The Annual Assignment Preference Form provides communication with employees in advance of their annual counseling session. It enables the counselor to review the preferences and provide feedback at the session on the employee's chances of getting such assignments, training, etc.

Our major changes are still Para F-3 which requires three nominees and Para F-4 to fill GS-08 and above positions on a Directorate-wide basis.

STAT

OP/Plans Staff

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CAREER MANAGEMENT OF CLERICALS IN THE DIRECTORATE FOR ADMINISTRATION

A. POLICY

1. The new approaches to personnel management recommended by the Personnel Approaches Study Group, endorsed by the Management Committee, and approved by the Director established one career service for the Directorate for Administration and charged the Deputy Director for Administration with the responsibility for the career management of all Directorate personnel. In order to provide a systematic career management program for all Directorate clerical personnel I am making the Head of each Career Sub-Group primarily responsible for administering the clerical personnel who carry his Sub-Group indicator (i.e., MP, MF, ML).

2. Clerical Evaluation Panels in the Sub-Groups will provide assistance and recommendations to the Heads of the Sub-Groups in the implementation of a Directorate-wide clerical career management program. A Clerical Advisory Committee will be the point of reference at the Directorate level for the coordination of efforts by the Sub-Group panels to unify procedures throughout the Directorate and to facilitate inter-Sub-Group movement.

B. CLERICAL EVALUATION PANEL

1. Each Head of a Career Sub-Group will establish panels to evaluate clerical personnel in grades GS-06 and above and those in lower grades who have been with the Agency three years or more.

2. The Heads of Career Sub-Groups will determine, based on the number of clericals and the diversity of functions performed by them, if more than one panel is required.

3. The membership of the panel will be employees at least two grades higher than the group being evaluated. However, there may be at least one adviser from the grades and/or functional groups being evaluated.

4. Members will be appointed for specific terms and rotated at staggered intervals. They may be reappointed for more than one term but will have a maximum limit of two years that they can serve.

5. Membership will be published to ensure that all clerical personnel are aware of the members of their panel.

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C. DDA CLERICAL ADVISORY COMMITTEE

1. The Deputy Director for Administration will establish a Directorate Clerical Advisory Committee to serve as a focal and coordinating point for the activities of the Sub-Group Clerical Evaluation Panels. The membership of the Directorate Clerical Advisory Committee will be comprised of a representative from each Clerical Evaluation Panel. The members will be appointed by the DDA from nominations from the Head of each Career Sub-Group; the chairperson of this committee will be appointed by the DDA but not necessarily from the participating membership of the committee.

2. The Clerical Advisory Committee will be primarily responsible for coordinating the activities of the various Clerical Evaluation Panels and for facilitating intra-Directorate communications among the panels. This Committee, through its chairperson, will work with the Directorate Senior Personnel Resources Board and the top Directorate management in matters pertaining to the clerical career management program.

D. ESTABLISHMENT OF CRITERIA FOR EVALUATION OF CLERICALS

1. Each panel will develop criteria for the evaluation of clericals for promotion, reassignment and training. The criteria developed in each Sub-Group panel (or panels) will be submitted to the Head of the Career Sub-Group through the Sub-Group Board.

2. The DDA Clerical Advisory Committee will review the criteria developed in each Career Sub-Group to establish, where appropriate, uniform criteria which will be utilized by all the Clerical Panels. If the evaluations are to provide the necessary basis for viable and uniform career management, there must be some common guidelines so that evaluations have equivalent meanings among the different components.

E. COMPETITIVE EVALUATIONS

1. The Clerical Evaluation Panels will use the established criteria to competitively evaluate at least annually clerical personnel in grades GS-06 and above and those employees in lower grades who have been with the Agency a minimum of three years. The lower grade employees who are excluded from panel review will be evaluated by their supervisors, who will make recommendations to the appropriate authorities for promotions, training, and reassignments.

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2. The Panels will competitively evaluate and rank the clerical employees and group them in the following four categories:

(a) those meriting immediate consideration for promotion or assignment to a position carrying a promotion possibility;

(b) those who may be considered now for promotion but would benefit from further developmental effort;

(c) those who are performing satisfactorily but do not merit promotion;

(d) those whose performance requires improvement in specified respects in order to be termed satisfactory.

3. The panels will recommend also certain training and/or types of assignments needed by individual employees to enhance their career development and recommend to the Head of the Career Sub-Group those qualified employees who should receive consideration for conversion to professional or technical status.

F. ELIGIBILITY FOR PROMOTION, REASSIGNMENT, AND/OR CONVERSION TO PROFESSIONAL STATUS

1. Ranking is meaningless without the opportunity to compete on the basis of qualification for higher positions when they become available. Thus, only those employees who are in the top two categories of the clerical competitive rankings will be considered eligible for promotion or reassignment to more responsible positions.

2. Employees in the third category may be considered for reassignment to positions of equivalent responsibility.

3. Three nominees will be selected from the roster of eligible candidates to fill each vacancy. If there are not enough eligible candidates available in the Career Sub-Group to fill a vacancy, a Vacancy Notice will be forwarded to the DDA Clerical Advisory Committee for distribution to the other Sub-Group Clerical Panels and, as appropriate, to other Directorates. Nominations will be submitted to the Head of the Career Sub-Group.

4. Positions GS-08 and above will be filled on a Directorate basis from among the eligibles in each of the Sub-Groups. The Head of the Sub-Group where a GS-08 and above position is to be filled should submit a Vacancy Notice and his list of eligibles to the Directorate Clerical Advisory Committee. The Committee will obtain the lists of eligibles from the other Sub-Groups, select three nominees and forward the names to the Head of the Sub-Group for final selection. A/DDA resolves any problems which cannot be settled between the Committee and Heads of the Sub-Groups.

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5. No candidates are to be considered for reassignment who have not been designated by their panels as eligible by virtue of performance or some other established basis. A potential candidate for a position should be notified to determine interest and feasibility in being considered.

6. When an individual who is not among the three eligibles nominated by the appropriate clerical panel is requested to fill a vacancy, justification will be submitted to the Directorate Clerical Advisory Committee. The Committee will make its recommendation for approval or disapproval to the Head of the Sub-Group where the vacancy exists. The Head of the Sub-Group will advise the Committee of his decision. If the requested employee receives the assignment contrary to the recommendation of the Committee, the Chairperson of the Committee will submit a brief report of the case to the A/DDA for his information or whatever action he deems appropriate.

7. There may be a need for some reassignments where the employees are not eligible for promotion but where considerations of personal relationships, the nature of the current job, or health indicate the advisability of a lateral transfer or a reassignment to a lower graded job. Such consideration will be within the purview of the panels to establish eligibility for reassignment.

G. COUNSELING

1. All clerical employees will be counseled at least annually. This may be done by the Sub-Group Career Management Officer or one of the members of the Clerical Evaluation Panel. Employees who are ranked in the lowest category (unsatisfactory performance) will be counseled within 30 days of the evaluation exercise and as often thereafter as is required to implement and monitor remedial action.

2. The Chairperson of the Directorate Clerical Advisory Committee will be responsible for arranging appropriate Directorate-level counseling on a confidential basis when Sub-Group level channels are deemed inappropriate by the employee and the Chairperson.

H. TRAINING

1. The Directorate Clerical Advisory Committee working with the Sub-Group Clerical Panels will develop and establish minimum training standards for clerical occupations and grade levels. Such training requirements should focus on better performance at the clerical level but not neglect the preparation, as appropriate, of clericals for transition to semi-professional and professional positions. Such training standards would be useful inputs for the Personnel Development Program, which will cover employees at the GS-09 level and up, and for upward mobility planning.

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2. The Clerical Panels should play an active part in making recommendations for training, informing the employees of the training available, and utilizing training as an established criterion for evaluation of clerical employees.

I. ANNUAL ASSIGNMENT PREFERENCE FORM

1. This form, submitted annually, would provide a sanctioned means for employees to indicate their desires for reassignment or training. It would provide a useful input both to the supervisor and to the panel. The information on the form is intended as the basis for career development and most effective utilization of the qualifications of the clerical employees.

2. The information obtained from such forms also would provide a useful basis for the annual counseling session of clerical employees. Desired training and reassignment aspirations can be discussed and recommended courses of action developed.

J. PERIODIC SURVEYS OF CLERICAL PERSONNEL

Periodic surveys indicating the attitudes of clerical personnel with respect to the operations of the clerical career management program should provide valuable data for the Clerical Evaluation Panels, the Career Sub-Groups and Directorate management.

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